

Le, Uyen-Chau

From: Kazimi, Hani
Sent: Wednesday, November 24, 2004 1:59 PM
To: Le, Uyen-Chau
Subject: RE: 10/726,754

Try (705/35, 36, 37, and 42) some key words you might want to consider:

(track\$ or updat\$ or match\$ or recocil\$) near3 financial near (transactions or records or accounts), then narrow it down by specific claim language.

Good luck
Hani

-----Original Message-----

From: Le, Uyen-Chau
Sent: Monday, November 22, 2004 10:05 AM
To: Kazimi, Hani
Subject: 10/726,754

Hi,

My name is Le. I'm working in art unit 2876. I'm currently working on a case that is related to a banking system. Would you please help me with some search (i.e., search areas in 705), I really appreciate it! The claim is as follows:

A method for reconciling a financial account of a user on a user device, comprising:

- accessing a user list of transactions entered by said user;
- downloading a financial institution list of transactions from a financial institution;
- storing said financial institution list of transactions on said user device;
- comparing said user list and said financial institution list item by item;
- providing a reconciliation function for each item on both of said lists;
- comparing said transactions to match transactions on said financial institution list to transactions on said user list;
- identifying unmatched transactions;
- attempting to match said unmatched transactions, absent user input, according to predetermined criteria to provide proposed matches;
- presenting said proposed matches to said user;
- accepting, on an item by item basis, a confirmation of said proposed matches by said user;
- presenting to said user a first group of transactions on said user list, but not on said financial institution list;
- presenting to said user a second group of transactions on said financial institution list but not on said user list;
- providing a user input capability for matching items from said first and second groups; and
- providing an indication whether an item has been cleared for each item upon completion of said reconciliation function.

Thank you very much!

Sincerely,